

# A CLEAR VIEW OF THE **TALENT LIFECYCLE**



With articles by:  
**Andre Lavoie**



**ClearCompany**  
617.938.3801

# TABLE OF CONTENTS



**PART 1:**  
RECRUITING & TOOLS

4



**PART 2:**  
THE CANDIDATE EXPERIENCE

7



**PART 3:**  
ONBOARDING

10



**PART 4:**  
PERFORMANCE MANAGEMENT

13



**PART 5:**  
COMPENSATION

16



**PART 6:**  
SUCCESSION PLANNING

18



**PART 7:**  
LEARNING & DEVELOPMENT

21



**PART 8:**  
OFFBOARDING

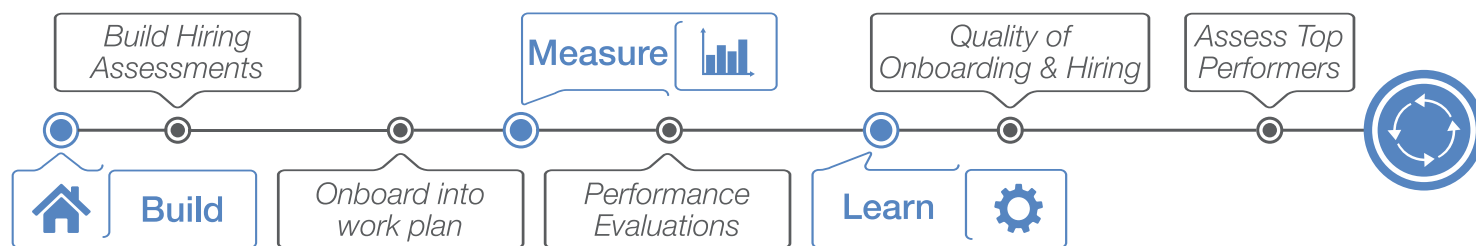
24

# INTRODUCTION

## INTRODUCTION

For everything there is a season, and that's true even when it comes to talent. The Talent Lifecycle is something we've been studying here for awhile at ClearCompany. You see we started as a simple ATS and as we worked with clients across the globe, we began to realize that hiring is dependent on so many other things. Having the right tools for instance, or crafting a good opening that aligned itself with business objectives. Of one thing we quickly became sure, recruiting and onboarding did not happen in a vacuum; these things are affected (and affect themselves) all other aspects of dealing with the workforce.

## THE TALENT LIFECYCLE



We called it the Talent Lifecycle; and with this realization the idea that if we built a platform around this philosophy that it would be not only in alignment with the issues that business leaders grapple with daily, it would allow the technology we'd built to work in tandem with those who work on the front line. In short, we felt this holistic view would benefit everyone in the organization over time.

In this white paper, you'll see how we break the Talent Lifecycle down into stages; from the basic (finding the right tools and recruiting to fill a need) to the high-level engagement, succession planning and performance management. We even tackle the stages that so few people talk about; exit interviews, offboarding and real-talk about compensation. It's a complete and granular dive into each stage of the Talent Lifecycle.



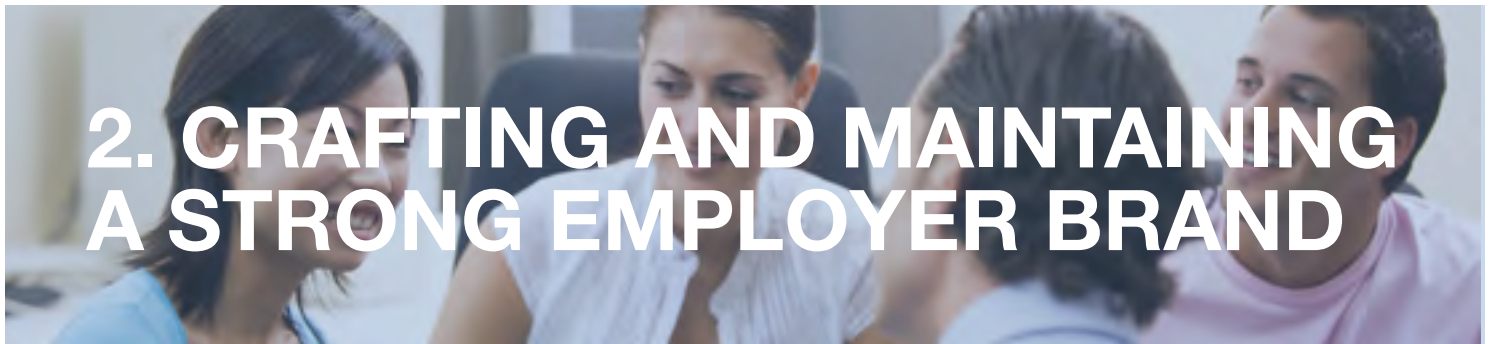
ClearCompany's journey has in many ways followed our clients' as they go from tactical struggles to strategic and sophisticated organizational issues. The platform (and those who build it) have evolved as well. Join us as we explore the total Talent Lifecycle and unpack each issue to help you navigate these stages in your own business.

# PART 1: RECRUITING & TOOLS

Recruiting and talent acquisition — is where the whole talent lifecycle begins. It's the first — and depending on whom you ask — the most vital step in the lifecycle.

According to a survey of 4,288 HR and non-HR managers by the Boston Consulting Group, **talent acquisition** is the single most important driver for revenue growth and profit. That's probably something you're going to want a strategy behind. So let's talk shop.

Talent acquisition, as a function, is broken down into three major parts:



# TALENT FORECASTING

With any strategy, you have to think a few moves ahead. A recruitment team in reaction mode is marginally as effective as one that has the tools and **resources to forecast their talent needs**. If you can only be reactive, you will fail to meet the true needs of the organization. The traditional standard of organizational efficiency is changing, and reactionary management of the recruitment process is no longer cutting it.



## STUDY

Study the industry, company and departmental trends. This may mean tapping into the data that your ATS and/or LMS have been collecting over the years. This historical data (which simply reveals what has already happened) can be used to **produce real-time and predictive analytics**. In other words, the data and metrics that you already have can be analyzed to discover how one data point is connected to another data point. Those connections shape and form what will happen, by giving recruiters the insights they need to make workforce decisions for the future.

## ONBOARDING

Onboarding and **post-hire interviews are full of information** that can be used to forecast recruiting changes. Consider these your 360-performance review of the recruiting department.

## STAY

Stay in touch with your current workforce about their forecasted talent issues. Perhaps someone knows that you should start looking for a new senior analyst... but that didn't come from me.

## CREATE

Create a constant dialogue with department heads about impending projects, traditionally busy periods and overall talent needs. By soliciting this information on a regular basis, recruiters put themselves ahead of the curve, instead of a constant game of catch-up.

## LOOK

Look to performance appraisals to **identify impending turnover**. You'll need a strong and real-time appraisal process to make this possible.



# CRAFTING & MAINTAINING A STRONG EMPLOYER BRAND

Do you know what type of companies continuously attract good talent? **Companies that build an employer brand** that says, “we love our people”, are the ones who always seem to have the resumes rolling in. Employee-centric brands walk the walk when it comes to proving that their most valuable asset is their talent. When an organization is truly obsessed with their employees, it shows throughout their entire company culture.



*“An employer brand is a billboard for the organization, and the importance of this public sentiment goes beyond recruitment efforts. Clearly, company reputation impacts attractiveness among potential candidates.*

*It is also clear a strong employer brand will further drive bottom-line results by creating a stable workforce, increasing productivity, and engaging key stakeholders. This affects all aspects of the organization, and when managed effectively, can elevate leadership and visibility within the company’s industry.”*

**Jim Link,**  
Director of HR, Randstad US

## EMPLOYER BRAND MESSAGING

It's vital to come to the realization that you have an employer brand message, whether you've purposefully crafted it, or not. Your message is what people think and feel about your company as an employer, and it's not necessarily the same as the image you have with customers. Are you crafting opinions, or are you simply writing job descriptions?

## EMPLOYER BRAND MESSAGING TOOLS

There are multiple mediums you can use to craft and deliver your strategic employer brand messaging — and thus your culture — but you don't have complete control over all of them. What you do have control over should be centrally managed with a fully integrated applicant tracking system.



### THE FEATURES YOU WILL USE:

- Automated career page updates
- Automated social sharing of job listings and updates across multiple social media outlets
- Automated job posting on job boards

Working from an ATS (your brand messaging HQ) will ensure that your branding remains consistent, updated across all mediums, and overall easier for a team, or an individual to manage. Redundancies and inconsistencies are eliminated at the ATS branding hub. The whole idea behind crafting your employer brand message is not only to attract candidates, but also to attract candidates that will [fit into your established company culture](#) with ease.

# PART 2:

# THE CANDIDATE EXPERIENCE



The second piece of the recruiting puzzle, is **crafting a positive and lasting candidate experience**. Any recruiter's tool of choice in this endeavor is going to be a strong ATS. The ATS is going to be your best bud throughout the entire recruiting process, especially managing the candidate experience. Here's why:

*"Both candidate and new-hire experience can influence an individual's overall perceptions of an organization and its work environment, whether they will reapply for another job at the organization, if they will refer other employees, and their performance and engagement within their first months on the job. In general, positive experiences have been found to increase engagement and positive perceptions of the organization, while negative experiences may lead to the opposite, such as decreased engagement and many other adverse consequences."*

- NorthCoast 99



# CANDIDATE EXPERIENCE

In short, candidate experience matters, and it is nearly impossible to manage without the automation and organization that a strong ATS provides. Here are the features and functions of an ATS as they relate to managing the candidate experience.



## RESUME PARSING

Resume parsing can drastically reduce your time-to-fill. This means that candidates can hear from you faster about the status of their application. Businesses are currently taking **22.5 days to fill a job** — 6 days longer than in 2009. The majority of candidates, who cite having a negative experience, don't believe that the hiring process followed a **reasonable timeline**.



## A RATING SYSTEM

A rating system will also expedite the process, as applicants are pre-sorted according to their rating. The average corporate listing can pull in around 250 resumes. When a recruiter is automatically given an organized (virtual) pile of rated resumes, from best to worst fit, they can drastically reduce the time an applicant has to wait to hear back.



## AUTOMATED, OR CANNED EMAIL COMMUNICATION

Automated, or canned email communication ensures that applicants are always in the loop. **58% of applicants do not receive regular updates** on their application. A major frustration of most candidates is that they don't hear from the organization after applying. Communication is made almost effortless with email automation. These can include emails like: "Thank you for applying", "Please come in for an interview", "We regret to inform you that you didn't fit the position requirements." You can cover every base with automated communication.



## ORGANIZE CANDIDATE INFORMATION

Organize candidate information and store it for future use in case the applicant wasn't a good fit this time around. Recruiters can make quality candidates feel welcome to apply again in the future, with their data securely stored. With 52% of applicants feeling as though they were **not treated like an individual**, gestures that make applicants feel valued are vital. Furthermore, secure ATS storage makes it simple for recruiters to access files and contact a candidate for other positions that become available.



# CANDIDATE EXPERIENCE



## AUTOMATE THE FEEDBACK PROCESS

Automate the feedback process. Soliciting feedback from applicants is an ideal way to collect objective data that can be used to further improve your recruiting process. With only 11% of companies **asking for candidate feedback**, this is a huge competitive advantage.



## AUTOMATION OF THE ABOVE ADMINISTRATIVE TASKS

Automation of the above administrative tasks allows recruiters to spend more time on the people matters of HR and recruiting. Recruiters are no longer bogged down with resumes and applications, endlessly searching their inboxes and profusely apologizing to quality candidates about their application getting lost in the shuffle. When recruiters can operate in a streamlined and organized process, they can then offer the same to their candidates.

**ONLY 11%  
OF COMPANIES  
ASK FOR  
CANDIDATE FEEDBACK**



# CANDIDATE EXPERIENCE



**DOES YOUR HR OR RECRUITING TEAM HAVE THE RIGHT TOOLS TO MAKE A POSITIVE IMPACT?**

Offering the best candidate experience possible starts with the tools and processes with which your recruiting team functions. Beyond automation and technology, it must also be **part of your company culture** and values to treat a candidate as you would a customer. After all, they probably are. The candidate experience that you offer will resonate loudly with current candidates, future candidates, employees, vendors and customer alike. Does your HR or recruiting team have the right tools to make a positive impact?

In an ideal world, the one ClearCompany lives in, each of these stages of the employee talent lifecycle doesn't take place in a silo. Traditionally, each stage is separated by people, data and technology, but the employee lifecycle, at any stage, can't be optimized that way. Each stage must lend itself to the next, in a flow, rather than in isolated segments.

# PART 3:

# ONBOARDING

There are two main components in all successful onboarding programs. On one hand, you have the acculturation of the new employee – **the human side of onboarding**. The other component is the paperwork and compliance side of onboarding. Both are vital, and both require the right tools to maximize efficiency.



When we talk about efficiency in the onboarding process, we mean getting the employee working at their fullest potential in the least amount of time. In order to do this, both components of the onboarding program have to be strong. Known in **economics as the break-even point**, the faster you get a new employee to this point, the higher the return on your investment in them will be. If this point is not reached before the employee leaves the organization, you are upside down on your investment.



*“Each year, nearly 25% of the working population undergoes some type of career transition. Turnover is expensive, so it’s important to support new employees with comprehensive onboarding to ensure their success. Onboarding is the process by which new hires get adjusted to the social and performance aspects of their jobs quickly and smoothly, and learn the attitudes, knowledge, skills, and behaviors required to function effectively within an organization.”*

**- SHRM Onboarding Report**

# ONBOARDING



According to Aberdeen's 2012 Onboarding Report, **onboarding is the leading area of talent management** that impacts retention. Let's think about this for a moment; do you believe that onboarding so severely impacts retention because all of the right paperwork got filled out, or because successful onboarding includes a focus on acculturation, socializing and mentorship? Although we're tech people, we get it; the human side of onboarding is vital in productivity, engagement and retention.

That being said, many employers are left wondering: So, where are all these resources to properly onboard each employee going to come from? The answer that surprises most business owners is — technology. By eliminating redundancies, inefficiencies and archaic processes on the compliance side of onboarding, organizations can free up resources to concentrate on the human side of human resources.





# TOOLS OF A SUCCESSFUL ONBOARDING PROGRAM



## PAPERLESS:

At this point in HR technologies, no organization should be paying printing and shipping costs for onboarding, or still managing a filing cabinet full of new hire packets. 60% of organizations cited their need to create a more **efficient onboarding program** in order to meet company growth objectives as a top pressure. Paperless onboarding not only offers more effective organization and storage of all new hire information, it also makes compliance a breeze. Furthermore, employees can actually complete their entire onboarding packet online, before the first day of work—getting them to the training and producing stages faster.



## UPDATED FORM LIBRARY:

You need different forms for different new hires, meaning that not every onboarding packet is going to be the same. Beyond that, you have to constantly make sure that your forms are compliant with the latest legislation. Automatically updated form libraries ensure that you always have the correct and current forms, and it is easily accessible.



## SMART FORMS:

One of the biggest time wasters in the onboarding process is the redundancy of many of the forms. Smart or Intelligent Forms (often referred to as both), fill out appropriate forms and fields with one entry of the information. No more filling out your name, address and SSN 47 times... on 47 different forms.



## AUTOMATED NOTIFICATIONS:

Accountability in the onboarding process can get complicated as signatures and paperwork bounce from one person to the next. With automatic notifications, your new hires and staff are notified when the ball is in their court, and how long they have to send it back. You can also set up automated emails for overdue tasks, like turning in paperwork, or giving your signature.



# TOOLS OF A SUCCESSFUL ONBOARDING PROGRAM



## LEGAL ELECTRONIC SIGNATURES:

Intelligent online onboarding forms with electronic signatures enable a compliant, paperless process that reduces errors and eliminates redundant data entry. HR users can easily create electronic signature forms for employee handbooks, policy acknowledgements and similar documents.

Automating the administrative side of onboarding creates exponential returns from new hires, managers, and HR staff alike. With paperwork and data entry out of the way, new hires can spend less time filling out forms, and more time doing what you actually hired them to do, getting them to full productivity sooner and more efficiently.

Perhaps the most significant element of our particular brand of onboarding is that the ClearCompany platform creates a flow from recruiting to onboarding. The common disconnect between these stages results in a sad sight we've all witnessed – the new employee standing around the water cooler for a week with no direction, no mentor and really no idea what's going on. A seamless progression for employees entering the onboarding stage means expedited productivity and more importantly it means, energized; positive and goal-driven first moments in the organization. The flow of the lifecycle then continues on to performance management, with the same transparency.

**25%** of the  
**WORKING**  
**POPULATION**  
UNDERGOES SOME  
TYPE OF  
**CAREER**  
**TRANSITION.**

# PART 4:

# PERFORMANCE MANAGEMENT



## WHY ISN'T PERFORMANCE MANAGEMENT BUILT WITH A STRATEGY THAT ALIGNS WITH THE COMPANY VALUES?

*“The employee performance appraisal is an underperforming, periodic business process that is loathed by both employees and managers alike. Historically linked to the annual salary review, performance appraisals often focus on HR-driven criteria for skills and competencies rather than business outcomes. The human resources management (HRM) technology solutions offered by leading vendors are typically built around this dysfunctional paradigm.”*

**- Forrester Research, Inc. report,**  
“Disrupt the Employee Performance Process to Align with Business and Customer Outcomes.” (July 2, 2014)

Those were some great words of wisdom from the latest Forrester report on the state of performance appraisals. Traditional performance management is a very backward-looking process. Until now, companies were so focused on last year's performance data that nothing was being done to actually drive success and make changes in the now.

Besides the focus being off, traditional performance management isn't built with a strategy that aligns with the company values and vision. In order to take performance management from being just another compliance issue, to driving the success of the organization strategically, you will rely heavily on performance management software.

# PART 4:

# PERFORMANCE MANAGEMENT



## SUCCESSFUL PERFORMANCE MANAGEMENT SOFTWARE:

Goals: According to a survey of 23,000 employees conducted by Harris Interactive, only 37% of employees understood what their employer was trying to achieve and why. A successful **performance management system** will put daily and big picture goals in front of employees regularly. This not only ensures that everyone is headed in the same direction, with the same map, but if a roadblock should threaten progress, your team can pivot together to ensure that productivity never takes a dip.



## TIME MANAGEMENT:

Are you sitting down? It is estimated that **less than 60% of work time** is actually spent productively. That translates to some serious losses financially. Beyond that, when a dismal standard like that is set, it can be hard to break the wasteful patterns and processes. Performance management software will track the time that individuals spend on projects or tasks, and relay the data to managers in an easy to read format. Managers can then pinpoint issues whether they are personal time management issues, redundant practices, poor technology or inadequate training. When you don't know there is an issue, you aren't looking for the solution.



## REVIEWS:

The current **employee appraisal processes** that most companies are still using are as ineffective as they are frustrating. 51% of employees see their performance appraisals as inaccurate, and 53% of employees are not motivated by their reviews. Increasing the frequency of reviews is great for starters, but companies should be introducing 360-reviews in which employees are not only evaluated by management, but also through **self-assessments and peer evaluations**. The entire process is managed and implemented online so that the data can be easily stored and used to make workforce decisions. The 360-review process establishes a more accurate and well-rounded profile of the employee's overall performance; replacing one-sided, frustrating reviews that might only reflect snapshots of performance.



## ACCOUNTABILITY:

Accountability is **one of the hardest things to establish**, and maintain in a workforce. Whether an employee drops the ball or a supervisor micromanages, it can be very tough to establish a culture of true accountability. The starting line is transparency. A successful performance management system will lay out all goals, tasks, assignments, deadlines and projects for everyone to see. Accountability is crystal clear, and easy to track.



## IDENTIFYING ISSUES:

A great performance management system is a lot like going to a hotel room and catching a glimpse of yourself in one of those magnifying mirrors. You see every single flaw, hair and wrinkle. A **transparent performance management system** does the same for organizations; leaders can see every roadblock, bottleneck and time waster. The first step to fixing an issue is identifying it.

# TOOLS OF A SUCCESSFUL ONBOARDING PROGRAM

## RECOGNIZING SUCCESSES:

Did you know that the number one reason that U.S. employees voluntarily leave their jobs is that they don't feel appreciated? Most managers don't set out to undervalue their employees, but few have a system to help them recognize their employees' successes in real-time. A successful performance management system will alert managers of successes in real-time, so they can continuously and effectively recognize employees before it's too late.

Performance management is going through some huge changes right now. Employers are starting to look at the whole system in a different light. It's no longer seen as a checkbox item, but rather a viable and integral part of driving organizational success. The biggest change is the breaking down of the performance management silo. Until now, with ClearCompany's fully integrated platform, performance management has been its own separate entity.

The traditional disconnect that we see between performance management and the other stages of the employee lifecycle renders the facilitation and management of each stage far less effective. Onboarding, compensation, succession, training and offboarding all have an essential connection with performance management and one another. Common HR technologies don't allow HR to connect these stages, with the organization's vision and goals at the hub, like ClearCompany's fully integrated suite.



**DID YOU KNOW THAT  
THE NUMBER ONE  
REASON THAT  
U.S. EMPLOYEES  
VOLUNTARILY LEAVE  
THEIR JOBS IS THAT THEY  
DON'T FEEL APPRECIATED?**



# PART 5:

# COMPENSATION

The average time-to-hire is at a 5 year high, and the skill gap is widening; employers are having a harder time than ever managing the balancing act that is compensation. With 52% of employers ranking **hiring and retaining talent** at the top of their business challenges, it is vital to get compensation right.



The cold, hard truth is that employees are currently waiting around with their hands out. According to the latest **Payscale Compensation Best Practices Report**, between 2009 and today, employer concern about retention has risen 29%. As turnover increases, retention is a rising concern for the majority of business owners. In 2013, 83% of companies reported giving raises, and over ¾ of those organizations gave raises to at least 50% of their workers.

This sounds like a hit for any employer trying to attract and retain quality talent (all of them), but the reality is that most of those raises were pay for performance based. That means that employers are getting back what they invest in their employees. 54% of raises given in 2013 were for performance.

## HIGHER PRODUCTIVITY + HIGHER PAY = EVERYONE WINS

The major takeaway is that if employers want to offer compensation that both increases retention and productivity, they have to step up their game in the performance management sector. Again, we're seeing this vital trend in employee lifecycle flow, and the HR technologies that offer transparency and collaboration between each stage. The following factors of a great performance management system will help decision-makers create effective compensation practices in any industry.

## BIG PICTURE PERFORMANCE:

Because compensation is so tightly intertwined with performance appraisals, it is imperative to look at the big picture when it comes to an employee's performance. The reason that 22% of **employees don't like performance reviews** is because they believe they don't account for past work. The archaic, one-sided, annual review process will often only address the most recent, short period of performance, neglecting to account for the entire year. Let's say that a poor performer has caught on to this pitfall in your performance appraisal system; they might up their performance and engagement, just long enough to snag a raise. You have now retained and incentivized poor performance.

Let's also say that a top performer in your workforce has had a rough couple of months, and let performance slip a little. You now run the risk of losing that good talent, because your review process made them ineligible for the raise that they actually deserve. You have now given this valuable talent a very good reason to leave the organization.



# COMPENSATION

## 360 REVIEWS:

“Seeking a better paycheck” was one of the top reasons employees left their positions in 2013. 360-reviews are the ideal way to establish a fair and transparent pay for performance model. **360 reviews combine self-assessments**, manager reviews and peer assessments to generate the most accurate and complete inventory of any employee’s performance. 360-reviews establish a trust and confidence in the employer/employee relationship, and that trust affects how employees regard their compensation.

When an employee can offer objective reasons to dole out, or withhold a bonus or raise, employees are more likely to have faith in that decision. Again, a good performance management system will **take the blinders off** of your entire process, and ensure that the right employees are rewarded and retained.



## TIME MANAGEMENT:

**Time management** is one of the biggest black holes of cash in most workforces. It is estimated that the average employee will waste at least an hour each day looking for the information that they need to do their job. These things are important to know when creating your compensation practices. You need to know exactly how employees are spending their time.

Here’s another scenario: A worker who was formerly out performing her co-workers, has put up some bad performance numbers lately. What the average performance management system’s data might not show you is that she is spending upwards of 30% of her time re-doing her new co-works subpar work. Instead of overlooking her for a bonus because her performance was plummeting, you can find the source of the issue, and remedy it. This employee can now return to maximum efficiency and will be appropriately compensated for it.

The cornerstone of a successful pay for performance compensation model is complete transparency. You have to look beyond today’s numbers if you expect to accurately compensate, and thus retain your employees. Beyond the strategy of effective compensation practices, the key to this balancing act of employee attraction and retention, and budget adherence, is truly the centralized collaboration of each of these employee lifecycle stages. We’ve said it before, but when stages, their data and their management are siloed, there is an intrinsic lack of efficiency that can start with recruiting, and flow all the way to the offboarding stage. While every stage is important, compensation happens to be one that makes the most notable impact on the bottom line. We think it’s time organizations starting getting it right, and we can help.

# PART 6:

# SUCCESSION PLANNING



Effective succession planning is going to involve strong goal alignment and robust performance management. One without the other is kind of like using a \$.25 claw machine to do your succession planning. So, get out your quarters, or learn about the tools and practices that can help you build an effective succession planning model.

Succession planning is the process that leaders use to identify and develop internal talent with the goal of using them to fill key leadership positions within the organization. So, while gauging performance is crucial, it is equally as important to foster this talent, and ensure that their professional goals align with those of the organization.



# IT'S CALLED A SUCCESSION PLAN FOR A REASON

Without a real strategy, you don't actually have a succession plan. A real succession plan is an evergreen project – a living strategy with many moving parts. Currently, about 1/3 of companies have no **succession plan** in place for their key leadership roles. That's a scary place to be.



## HERE'S HOW TO GET STARTED:

### 1. IDENTIFY KEY LEADERSHIP POSITIONS

Identify key leadership roles that will be part of the planning. This will mean that one person, or a team, will propose which positions need succession planning, and they will then present this list to executives for evaluation. This list must be agreed upon before proceeding.

### 2. CREATE LIVING PROFILES FOR KEY LEADERSHIP POSITIONS

Next, the succession planning team will create profiles for each one of these roles. These profiles will be living documents of the pivots, training, soft skills, hard skills and experience that this position has entailed. A good rule of thumb is to update these profiles as frequently as any changes happen. Loop executives in on these changing profiles and seek approval on a semi-regular basis. It will come in handy down the road...

Don't want to bug the C-suite or the board? It's their job! When survey respondents were asked what segment of the company was most involved with succession planning, obviously Human Resources came in first at 80%, followed by the C-suite at 61%, and the Board of Directors at 42%.

# IT'S CALLED A SUCCESSION PLAN FOR A REASON

## THE HARD PART:

### 1. IDENTIFY POTENTIAL SUCCESSORS

Here's where it gets a little tricky. Until this point, this process has been pretty objective. Now for the hard part – choosing potential successors. Well, with the right tools, it really isn't too bad. You are going to rely heavily on your performance management and your talent alignment platforms. The collaboration of performance management, goal alignment and succession planning are vital in creating an effective and truly strategic plan. Use the profiles you've created and cross-reference them against the mounds of performance data you've collected.

You might find (like many organizations that we've worked with) that your performance management isn't asking questions or collecting relevant data that can help you connect these dots. If that's the case, work with your performance management team to work succession planning needs in with quarterly reviews.

Now, the very specific information that you need is a built-in part of a continuous and organized process. Profiles can now be seamlessly compared with performance reviews, to create the most accurate talent pools you can come by in succession planning.

### 2. FOSTER POTENTIAL SUCCESSORS

The tough part here is keeping everyone moving toward the same goals, at the same time. This is why complete goal alignment is so crucial. The company goals, the goals of the position for which you're planning, and the professional goals of the potential successor have to travel through time like a constellation.

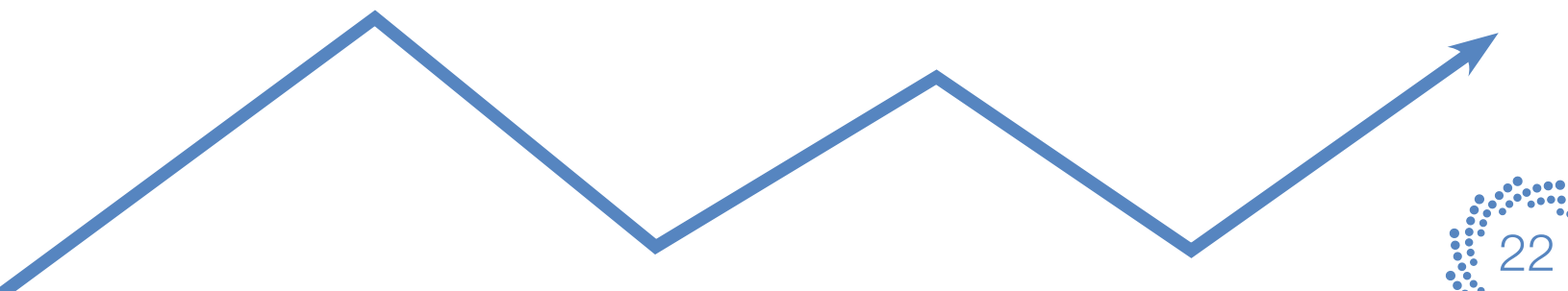
A good goal alignment platform will keep micro and macro goals front and center on a daily basis. When a goal takes a pivot, everyone is in on the changes. Everyone, all the way up and down the ladder, can center themselves on goal transparency throughout the organization.

### 3. NOW, ESTABLISHING BUY-IN FROM EXECS IS SIMPLE

The executives have already approved the positions and profiles for which the succession planning team is targeting. You now have data and documentation to ensure that the right employee has been fostered for their future role, and their qualifications are exactly in-line with the requirements of the position.

Note how all data and management practices must be working in tandem to achieve this succession planning ideal. In this instance, performance management, compensation, training and succession planning will all be the key elements that require transparency.

Beyond qualifications, complete goal alignment throughout the successor's career establishes that their personal goals are a match for the organization. It's not all that difficult, but as the name suggests, it takes a great deal of planning. All of that planning is made easier with an optimal performance management system and goal alignment platform at hand.





# PART 7:

# LEARNING & DEVELOPMENT



Straight from the analyst's keyboard — corporate training is booming. Companies are literally investing more than ever in the learning and development of their talent. About time! Just one problem — companies are spending money on training hand over fist, but they aren't really doing anything to measure or manage that investment.

We think it's wonderful that corporate training spend has increased by over 12% in just the last couple of years , but with that large of an investment, organizations need to be doing more to ensure a return.

*"One of the most important (yet often least respected) parts of business is corporate training. U.S. businesses spend on average over \$60 billion per year in this area supporting an industry that includes hundreds of thousands of training professionals, content and tools providers, and technologies."*

**- Josh Bersin,**

Senior Analyst, Bersin by Deloitte





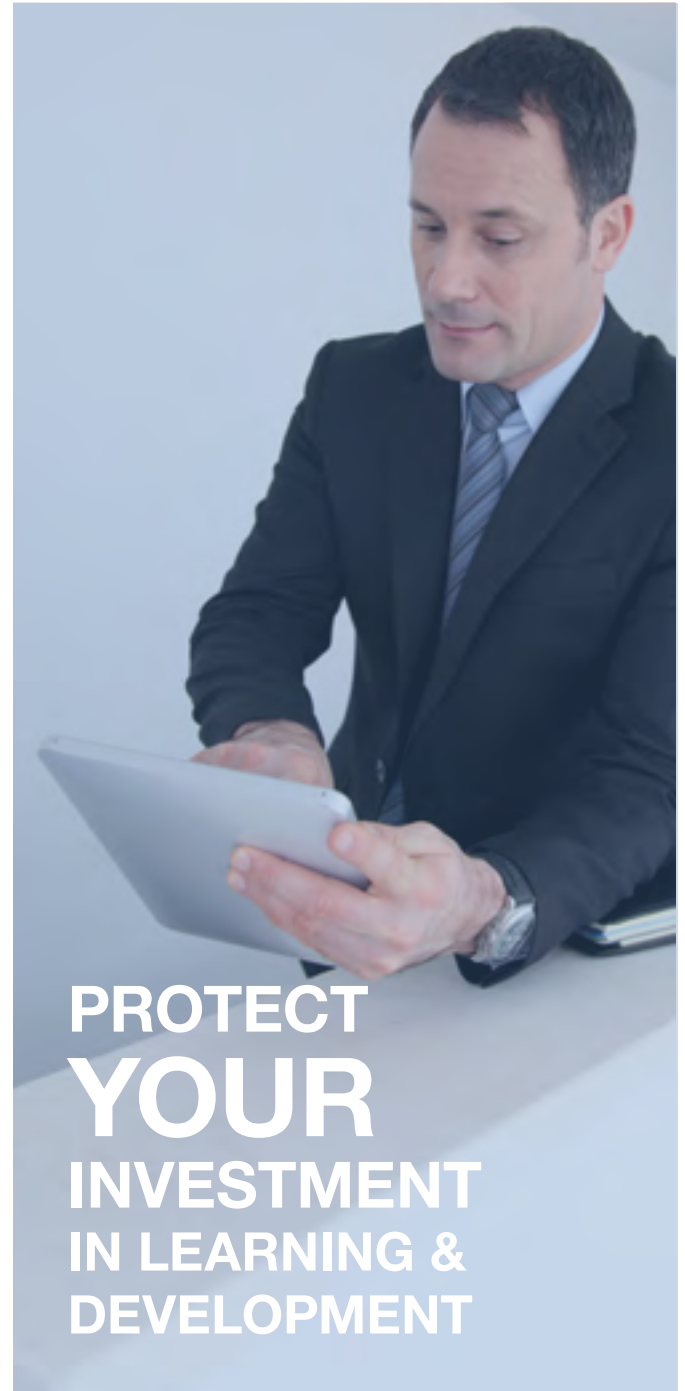
# FINDING THE L&D GAPS

Protect your investment in learning & development by implementing processes and systems that find the gaps (aka the places in which your money is being wasted). This is done a few different ways.

## LOOK TO YOUR PERFORMANCE MANAGEMENT SYSTEM

Think of your performance management and training as best friends. You can't be effective at one, without the other. This is another strong case for fully integrated HR technologies that grant leaders and decision makers a complete understanding of each employee in every aspect of their position, in every stage of their lifecycle with the organization. Effective performance management software should track each area of any given worker's performance. First, take a look at your performance data, and find out where the numbers are consistently coming in lowest across the board. Doing this could pinpoint a macro workforce training issue. If everyone is struggling in a certain area, you have your issue on a silver platter.

This also works on an individual level. Perhaps a talented and good worker has been given a task that they have no frame of reference for, and no training to boot. This can often happen when the work of an exited employee is dispersed. Their performance reviews and numbers are going to show it (if you're diligent about your performance management).



# FINDING THE L&D GAPS



## THIS PRESENTS A FEW PROBLEMS

- Quality is suffering
- Your KPIs will be way off
- Bottlenecks are probably forming
- You could pass this good employee up for a raise or bonus, for something that is not their fault, thereby increasing the likelihood of voluntary turnover

## USE REVIEWS TO DISCOVER STRENGTHS AND INITIATIVE IN YOUR TALENT

Are you aware that you're probably promoting and training a whole bunch of workers whose hearts are just not in it? OfficeTeam research revealed that 76% of employees polled said they have no interest in having their manager's position. In addition, 65% believe they couldn't do a better job than their boss. All right folks, let's make sure we're promoting and training the right people. No wonder we're at a worldwide rate of 13% full employee engagement.

It is pretty obvious how this all also ties in with succession planning. Your succession plan and training should work in tandem. Traditionally that has been hard to do with disjointed systems, processes, data and leadership. Transparency of lifecycle stages like training and succession optimize each step and process therein.

We've found that the best way to find out who is engaged, and looking to move up in the corporate ladder, which generally entails costly corporate training, is to ASK—pretty simple right? Make training part of your review and assessment processes. You can find strengths, reveal potential successors and use training as a retention incentive. And most of all, train the right people.

By finding these gaps in your training program with the use of good performance management and succession planning, you are not only ensuring a better return on your investment in L&D, but you're also improving your employer brand. It's insanely frustrating for an employee to be handed a task, or directive that they are ill equipped to deliver on. Beyond that, imagine managing a team full of those under-qualified workers.



# PART 8:

# OFFBOARDING

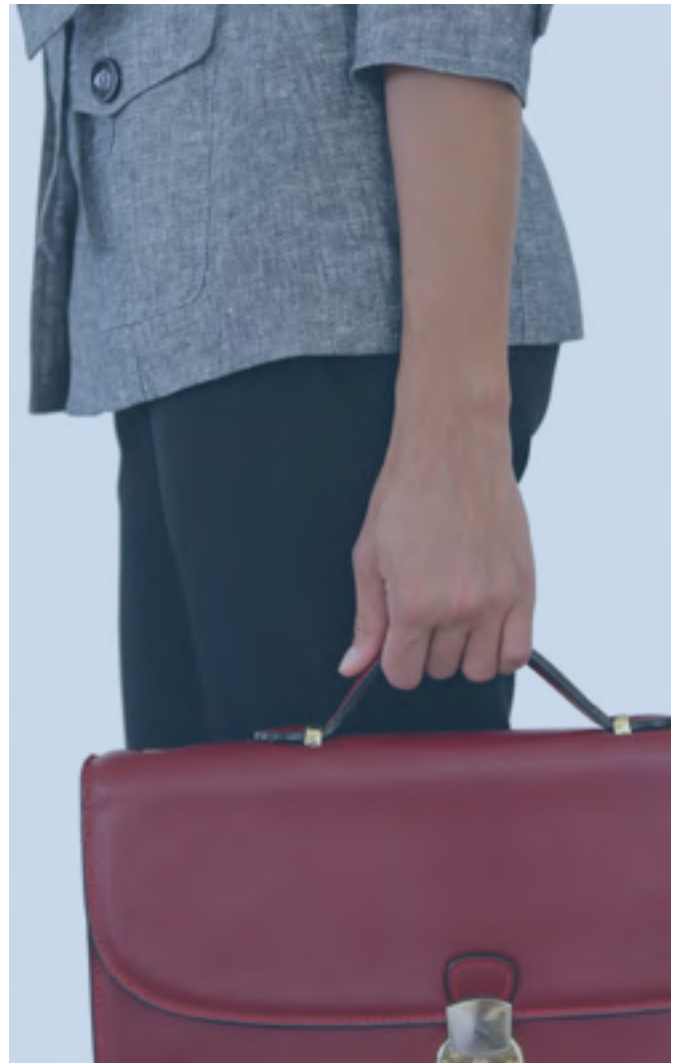
Offboarding is essential for all exiting employees, whether their exit is voluntary, mandated or the employee is entering retirement. Sad to say, according to Aberdeen's 2013 Offboarding research, only about 29% of organizations have a formal offboarding process in place. In this process, the employer has a few goals;

## CHECK OUT WHAT THE OTHER 71% ARE MISSING:

- Identify turnover issues
- Locate employee engagement roadblocks
- Pinpoint recruiting and onboarding strengths and weaknesses
- Gauge the exiting employee's perception of the employer brand
- Leave the door open for quality, exiting talent



When all of the above are achieved with the company's visions and goals in mind, that is what a strategic offboarding program looks like. Each objective is important to the big picture goals and your ability to clear the path to them. Meeting business objectives means recruiting, engaging and retaining your key talent.



# SUCCESSFUL OFFBOARDING

## SUCCESSFUL OFFBOARDING IS CRAFTED WITH THESE AIMS IN MIND

As the final piece of the entire talent lifecycle that has been fostered with the right tools and practices, the good news is that there probably aren't going to be too many shockers lurking around here. When each stage of the employee lifecycle lends itself to the others through technology and leadership, you've created a transparency that ends optimally.

You've taken great care in your employee appraisal process to uncover turnover issues, and increase retention efforts. At this point, the offboarding process will likely not present anything about this employee's departure that you didn't already know from your stellar performance management. If you do obtain new information about the details of their departure, a good offboarding documentation process will allow you to apply this knowledge where relevant.

With your goal alignment software, you've been able to identify engagement issues, and remedy them in real-time. The biggest problem with most engagement initiatives is that they are retro facing. Engagement is an issue that needs addressing today. Although you have mounds of engagement data on this employee alone, it is vital to solicit further information, in case your process can improve in any way.

One thing that your applicant tracking system and paperless onboarding platform can't do is improve upon itself (besides stellar upgrades and automated online services). It takes a person with a passion for improving your entire talent acquisitions process. While your ATS and paperless onboarding can be set up to collect candidate and employee experience data, it is a nice personal touch to solicit this information straight from a person who has been there and done that.

It is vital to gauge the exiting employee's perception of the employer brand for a couple of reasons. Firstly, although you have thoughtfully incorporated the solicitation of this information in your quarterly employee reviews (at least you better have!), being face-to-face with the exiting employee gives them one last chance at sharing their feedback, thoughts, frustrations, feelings and hopefully even praises. Asking about their perception of the employer brand will also help to ensure that the exiting employee feels valued. This is another opportunity to collect and build a pool of objective data to help you confidently make workforce decisions, going forward.

Lastly, this is your chance to either retain or leave an open invitation for quality, valued talent. When each step of the talent lifecycle is documented and organized, it's not hard to identify key talent. Take this opportunity to make them feel welcomed back, and ask what can be done to make that happen.

You have all of their performance data, you have the feedback that they've given the organization, and now you have an exiting employee. Where did you go wrong? Where are the gaps in your processes, and at what point in the talent lifecycle are they occurring? Connecting those dots is virtually impossible without tools that work together — total integration.





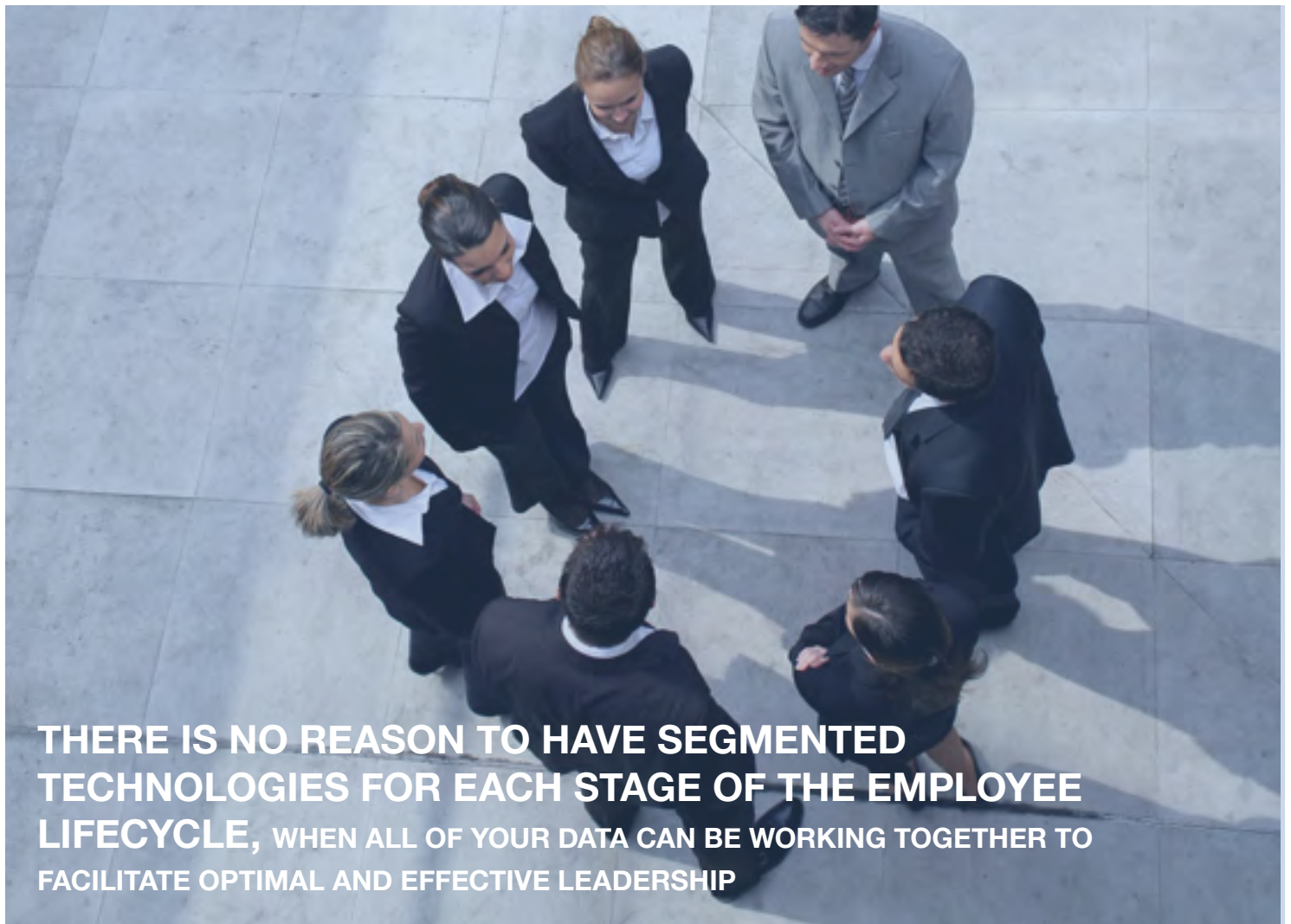
# SUCCESSFUL OFFBOARDING

## THE GOOD NEWS

Every tool that we've mentioned in the talent lifecycle series are part of the ClearCompany solutions package. They are fully integrated solutions that work throughout the talent lifecycle, putting your vision and goals at the center of every stage.

I hope we've introduced you to a new way of looking at the employee lifecycle. One without silos, one without a disjointed process, information and goals. There is no reason to have segmented technologies for each stage of the employee lifecycle, when all of your data can be working together to facilitate optimal and effective leadership.

We would like to take you through each step of the talent lifecycle, and show you how our solutions can optimize each minute of it.





# CONCLUSION

## THANKS FOR READING,



### Andre Lavoie, CEO and Co-Founder

Andre is the CEO and co-founder of ClearCompany. Prior to ClearCompany, Andre was Global Managing Director at Thomson Reuters, where he ran a 1Bn global business across 90 countries. Prior to Thomson Reuters, Andre was responsible for product development and operations at CCBN, a company he helped grow from a small start-up to number 36 on the INC 500.

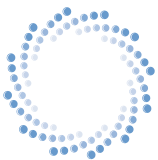
Andre is an expert at product innovation. He has filed nearly ten patents in the knowledge and information industry and is an avid speaker and contributor to many of the nation's largest publications with a focus on talent innovation.

Andre graduated from Boston College with concentrations in computer science and communications and is a member of YPO, (Young Presidents' Organization). He lives in San Francisco with his wife and two boys.

## CONCLUSION

Did you catch it? How in the end, we came completely full circle with the Talent Lifecycle? I hope so. Because that's what so many technologies and platforms miss. Proprietary platforms and one-off plugins can't come close to helping you manage your talent. And worse yet, they aren't scalable. We hope this book has made it seem, if not easy, simple to follow just how you can guide your talent acquisition team through this process (even if your entire team is just you). We've seen hundreds of companies walk this same path and through our technology and service, heard their pain points at each stage. We hope this roadmap to the Talent Lifecycle was helpful to you. If you have any questions or you would like to see how ClearCompany's platform addresses each of these stages in detail, please call or email.

## CONTACT OR CONNECT WITH US



ClearCompany

[www.clearcompany.com](http://www.clearcompany.com)

617.938.3801



And keep coming back to the ClearCompany blog and Resources section for more material on how to hire, manage and keep talent in your organization.

# SOURCES

## CLEARCOMPANY SOURCES [CLICKABLE LINKS TO EACH ARTICLE]

[A Clear View of the Talent Lifecycle: Recruiting and Tools \[Part 1\]](#)

[A Clear View of the Talent Lifecycle: Recruiting and Tools \[Part 2\]](#)

[A Clear View of the Talent Lifecycle: Onboarding \[Part 3\]](#)

[A Clear View of the Talent Lifecycle: Performance Management \[Part 4\]](#)

[A Clear View of the Talent Lifecycle: Compensation \[Part 5\]](#)

[A Clear View of the Talent Lifecycle: Succession Planning \[Part 6\]](#)

[A Clear View of the Talent Lifecycle: Learning \[Part 7\]](#)

[A Clear View of the Talent Lifecycle: Offboarding \[Part 8\]](#)

